

## First and Final Account and Report of Administrator and Petition for Allowance of Ordinary Commissions and Fees and for Distribution

<b>DOD: 02/10/92</b>		<b>PUBLIC ADMINISTRATOR</b> , is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order 1/27/16:</b> Counsel requests continuance to address the defects listed in the examiner's notes.  The following issues remain noted:  1. Need consent to distribution in undivided interests from the beneficiaries pursuant to Local Rule 7.12.4.  <u>Note:</u> Declaration filed 2/25/16 states agreements were sent to the heirs for signature on 2/16/16, and to date, no executed agreements have been received. The heirs were given 30 days to sign and return the agreements.  2. The Petition was filed with a Fee Waiver. The Petition indicates that the distributees will be paying the costs of administration outside of the estate, but does not address the filing fee. Filing fee of \$435 should be paid as a cost of administration.  <u>Note:</u> Declaration filed 2/25/16 states the heirs were given 60 days to pay the total costs of administration.  Reviewed by: JF/skc Reviewed on: 2/29/16 Updates: Recommendation: File 1- Hamilton
		Account period: <b>06/30/10 – 03/19/15</b>	
		Accounting: <b>\$107,198.00</b>	
		Beginning POH: <b>\$107,198.00</b>	
		Ending POH: <b>\$105,000.00</b>	
<b>Cont. from 012716</b>		Administrator: <b>\$1,000.00</b> (less than statutory) – to be paid outside of the estate	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Attorney: <b>\$1,000.00</b> (less than statutory) – to be paid outside of the estate	
<input checked="" type="checkbox"/>	<b>Verified</b>	Bond Fee: <b>\$268.00</b> (ok) – to be paid outside of the estate	
<input checked="" type="checkbox"/>	<b>Inventory</b>	<b>Distribution, pursuant to intestate succession, is to:</b>	
<input checked="" type="checkbox"/>	<b>PTC</b>	Danece A. Hannah-Hamilton – ½ interest in real property	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Jennifer N. Hannah-Hamilton – ½ interest in real property	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>	04/7/92	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		



**Petition for Probate of Will and for Letters of Administration with Will Annexed;  
Authorization to Administer Under the Independent Administration of Estates Act**

<b>DOD: 10/3/11</b>		<b>FRESNO COUNTY PUBLIC ADMINISTRATOR</b> is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA without bond.  Full IAEA – ok  Will dated 8/11/09  Residence: Fresno Publication: Business Journal  Estimated value of estate: Real property: \$311,000.00  Probate Referee: Rick Smith	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Petitioner lists only the decedent's four living children at #8; however, it appears that there are additional people entitled to notice of this proceeding, including:  - Vanessa Galvan (Daughter of deceased son Frank Garcia Galvan, mentioned in the will)  - Vivian Saicon (Granddaughter and Named alternate executor and former conservator of the person)  Therefore, need revised declaration re #8 and proof of service of Notice of Petition to Administer Estate on Vanessa Galvan and Vivian Saicon at least 15 days prior to the hearing per Probate Code §8110.  2. Need date of death of Frank Garcia Galvan per Local Rule 7.1.1.D. <u>Note:</u> Declaration filed 2/26/16 indicates a date of death for a <i>David</i> Garcia Galvan. Is this a typo? There is no <i>David</i> listed at #8.  <u>Note:</u> If granted, the Court will set status hearings as follows:  <ul style="list-style-type: none"> <li>Wednesday August 3, 2016 for filing Inventory and Appraisal</li> <li>Wednesday May 3, 2017 for filing the first account or petition for final distribution</li> </ul>	
<b>Cont. from 121515, 012716</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			S/P
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
<b>Reviewed by:</b> skc				
<b>Reviewed on:</b> 2/26/16				
<b>Updates:</b> 2/29/16				
<b>Recommendation:</b>				
<b>File 3 - Galvan</b>				

Atty Schacher, Kara, of Paso Robles (for Esperanza S. Boone, Administrator)

## Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

<b>DOD: 6/15/2012</b>	<b>ESPERANZA S. BOOKE</b> , sister, was appointed Administrator with Full IAEA authority without bond on 1/9/2013.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Continued from 8/26/2015.</b> Minute Order states counsel requests a continuance to a date past the SLO County trial date of 2/2/2016. If the petition is filed at least two court days prior, then no appearance is necessary on 3/2/2016, but if it is not filed then a status report verified by the client is to be filed.
<b>Cont. from: 030714, 040414, 061215, 072315, 082615</b>	<b>Letters issued on 1/16/2013.</b>	
<b>Aff.Sub.Wit.</b>	<b>Pursuant to Probate Code § 8800(b),</b> <i>Final Inventory and Appraisal</i> was due <b>5/16/2013.</b>	<b>The following issues remain:</b>
✓ <b>Verified</b>	<b>Inventory and Appraisal filed on 8/22/2013</b> shows an estate value of <b>\$0.00</b> , indicating this is a no-asset estate opened in order to allow the personal representative to proceed with a wrongful death claim on behalf of Decedent's heirs.	1. Need <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 8800(b), identifying recovered funds from the litigation proceeding.
<b>Inventory</b> X		2. Need first and final account, or current verified Status Report and proof of service of the Status Report pursuant to Local Rule 7.5(B).
<b>Account</b> X	<b>Pursuant to Probate Code § 12200</b> , first account and/or petition for final distribution was due <b>1/16/2014.</b>	
<b>Not.Cred.</b>	<b>Declaration of Attorney filed 8/6/2015 for the previous status hearing states:</b>	
<b>Notice of Hrg</b>	<ul style="list-style-type: none"> <li>She has spoken to <b>ROBERT MAY</b>, Attorney for Esperanza Brook in the Eastern District Court of California, Case [number omitted], and she received a copy of the <i>Order Setting New Dates</i> via email from Mr. May on 7/30/2015, which shows the new trial date in that matter was continued to <b>2/2/2016</b>; (copy of Order attached; copy of email from Robert May with docket text printout also attached);</li> <li>She asks that the status hearing be set thereafter on this matter, and that she be allowed to appear by Courtcall at the hearing on 8/26/2015.</li> </ul>	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
✓ <b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 2/29/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4 – Salinas</b>

## First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of Compensation to Executor and Attorneys for Ordinary Services and for Final Distribution

<b>DOD: 7/4/12</b>		<b>WILLIAM MARTIN (MARTY) SHIBA,</b> Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order 1/13/16:</b> Cousnel requests an additional 45 days for negotiations with DHS.  <b>See Page 2 re status.</b>  <b>The following remains noted:</b>  <b>1. Disbursements schedule includes payments related to real property (mortgage, util, maintenance); however, no real property was inventoried in this estate. Need clarification.</b>  <b>Declaration filed 8/10/15 by Attorney Hiyama states the real property is held in the Shiba Family Trust. Because the trust did not have any accounts, maintenance expenses were paid from the estate.</b>
<b>Cont. from 081215, 101415, 011316</b>		Account period: 7/4/12 through 5/15/15	
		Accounting: \$74,985.35	
		Beginning POH: \$70,121.84	
		Ending POH: \$10,189.30	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	3/29/13	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

Account period: 7/4/12 through 5/15/15

Accounting: \$74,985.35

Beginning POH: \$70,121.84

Ending POH: \$10,189.30

Executor (Statutory): \$2,859.41

Attorney (Statutory): \$2,859.41  
(Payable \$750.00 to Dean Hiyama and \$2,109.41 to Executor's former attorney, G. L. Motsenbocker)

After payment of fees, costs, reimbursement of costs and expenses, there will be one creditor's claim from the Dept. of Healthcare Services with a balance remaining of \$495,569.42. Petitioner requests to pay the remaining \$2,970.48 to DHS with the first \$492,548.94 of any thereafter discovered property until the claim is satisfied in full.

After said claim is satisfied, any other property of the estate not now known or discovered should be distributed to the four heirs in ¼ shares each pursuant to Decedent's will.

**SEE PAGE 2**

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 2/26/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 5 – Shiba</b>

## Page 2

**Status Report filed 10/9/15 states** Attorney Hiyama has been in contact with the Dept. of Health Care Services with regard to objections they may have and to getting a written statement that they do not object to the final distribution payout. There remain some minor issues re DHS' concerns with payments made from the estate and DHS is requesting some documentation. The Executor is gathering any and all necessary documents. Therefore at this time it is requested that hearing be continued for 60 days to allow time to reach agreement with DHS.

**Status Report filed 12/30/15 states** DHS requested documentation on payments made by the estate, which was been provided. At this time Attorney Hiyama and a representative for DHS are in negotiations in order to reach an amicable settlement. An additional 45 days is requested to allow time to reach a mutual agreement with DHS.

**Status Report filed 2/26/16 states** settlement has been reached with DHS and the office of the Attorney General is preparing a settlement agreement, which is expected to be received in the next two weeks. Mr. Hiyama therefore requests further continuance of an additional 30 days.

## Status Hearing

		<b>CECILIA RODRIGUEZ</b> , mother was appointed Guardian of the Estate on 10/29/13 with all proceeds (\$40,000.00) to be deposited into a blocked account.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		On 10/15/13, Guardian filed a Petition for Authority to Expend Money for Support and/or Maintenance and/or Education of Minor.	<b>Minute Order 1/6/16:</b> The Court signs the withdrawal order, including March 2016 on the order. Counsel is to file updated class information and progress for the next hearing.
<b>Cont. from 041515, 071515, 072215, 081215, 111815, 010616</b>		On 04/15/14, the Court granted Guardian's Petition for Authority to Expend Money, etc. allowing Guardian to withdraw \$1,000.00 per month from the blocked account beginning 04/15/14 and continuing for 12 months without further court order. Numerous Status Hearings have been heard on this matter since 04/15/15.	1. If further withdrawal is authorized, need order.
<b>Aff.Sub.Wit.</b>		<b>Declaration filed 2/23/16</b> provides a copy of her enrollment verification for the 2016 Spring semester at Reedley College reflecting enrollment in 20.5 units, along with her class schedule and confirmation that she is in good standing with no monies due on her account. She added English 125, which was necessary to complete her program. She continues to attend classes and expects to complete her program at end of May 2016. Ms. Rodriguez respectfully requests the court allow her to continue to withdraw funds of \$1,000.00/month through May 2016 without further hearing. She needs these proceeds to continue to care for her son and finish her certification at Reedley College.	
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<b>Reviewed by:</b> JF/skc
			<b>Reviewed on:</b> 2/29/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 6 – Rodriguez</b>

**First Amended First and Final Account and Report of Executor, Petition for Final Distribution**

<b>DOD: 11/14/13</b>		<b>KIMBERLY KYLE HALL</b> , Executor, is Petitioner.  Accounting - <b>\$300,000.00</b> Beginning POH - <b>\$300,000.00</b> Ending POH - <b>\$300,000.00</b>  Executor - <b>waives</b>  Attorney - <b>\$5,000.00</b> (less than statutory)  <b>Proposed distribution is to:</b>  Kimberly Kyle Hall and Whitney Erin Hurd as Co-Trustees of the John J. Oppelt and Barbara J. Oppelt Revocable Trust	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need declaration pursuant to Local Rule 7.12.5 setting forth the name of the trust, its establishment date, taxpayer identification number, verifying that the trust is in full force and effect and that the trustee has an executed copy of the trust in possession.
<b>Cont. from 012016</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b> 11/17/14		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

<b>Reviewed by: KT</b>
<b>Reviewed on: 3/1/16</b>
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 29- Oppelt</b>



Attorney Heather H. Kruthers (for Petitioner Public Guardian)

## First Account Current and Report of Conservator and Petition for Allowance of Compensation

			<b>PUBLIC GUARDIAN</b> , Conservator of the Person and Estate, is Petitioner.  <p align="center">~Please see Petition for details~</p> <p>Court Investigator's Report filed 11/4/2015.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> If the <i>Petition</i> is granted, Court will set a status hearing as follows:  <ul style="list-style-type: none"> <li><b>Tuesday, January 9, 2018 at 9:00 a.m. in Dept. 303</b> for filing of the second account.</li> </ul> Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.
Cont. from 012716				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters	101614		
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<b>Reviewed by:</b> LEG	
			<b>Reviewed on:</b> 2/29/16	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 8- Badiali</b>	

## Petition for Withdrawal of Funds from Blocked Account

		<p><b>KAYSIA BARR</b>, maternal grandmother, and <b>KEITH BARR</b>, maternal uncle, co-guardians of the estate, are petitioners.</p> <p><b>Petitioners state</b> the minor lives with Kaysia Barr and David Barr, co-guardians of the person. Their total monthly income from Social Security is \$1,743 per month. They receive \$457 a month in Social Security Death Benefit for Allison. Kaysia Barr and David Barr have paid for all of the expenses of the guardianship from their personal funds.</p> <p>Petitioners state they agree to pay Kaysia Barr and David Barr reimbursement of \$5,367 for medical expenses not covered by insurance, ½ of the court ordered therapy in the amount of \$637.50 and a total of \$866 for filing fees. In addition, the guardians also request reimbursement of ½ of the investigator fee, \$599.33 and ½ for attempted service on the father, Rick Holt in the amount of \$56.83.</p> <p>Balance in the blocked account totals \$65,731.13.</p> <p>Petitioners state the total amount requested for reimbursement is \$7,469.83.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Costs are not itemized but listed as totals for each category. Need itemization.</li> <li>Receipts attached to the declaration do not total the amounts requested.</li> </ol>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			W/
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> KT
<b>Reviewed on:</b> 3/1/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 9- Holt</b>

**10A In Re: The Kermit F. Fish and Rosalie J. Fish Revocable Living Trust Agreement dated 10/25/1993; Trust A-the Survivor's Trust; Trust B-the Family Trust Case No. 15CEPR00402**

**Attorney Nahigian, Eliot S. (for Petitioners Phillip F. Fish and Andrea K. Fritzen)**  
**Attorney Adams, Jon P. (for Objector Joseph F. Fish)**

**Petition to Remove a Co-Trustee and Appoint Successor Trustee; for Instruction to Trustee to Reimburse Income Tax Payments, Remedy a Breach of Trust, Pay Accountant, Withdraw Certificates of Deposit, and Distribute Trust Estate**

<b>Kermit F. Fish</b> <b>DOD: 8/18/03</b>	<b>PHILLIP F. FISH and ANDREA K. FRITZEN</b> are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Rosalie J. Fish</b> <b>DOD: 8/2/14</b>		
<b>Cont. from 060215, 071415, 102715</b>	<b>Petitioners state:</b> Kermit F. Fish and Rosalie J. Fish established the <b>Kermit F. Fish and Rosalie Revocable Living Trust</b> on 10/25/93, amended 12/4/95. Upon the death of Kermit Fish on 8/18/03, the trust was divided into two sub-trusts: a revocable Survivor's Trust (the <b>Rose Fish Trust</b> ), and the irrevocable <b>Family Trust</b> . Rose Fish amended the Rose Fish Trust on 6/21/07.	<p><b>Minute Order 10/27/15:</b> The related civil matter is set for mediation on 2/3/16. Should the matter not resolve, Counsel is to provide updated written status reports.</p> <p><b>Note:</b> Status reports were filed 2/16/16 and 2/26/16. See last page.</p>
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	The Co-Trustees of the Family Trust are <b>PHILLIP F. FISH and JOSEPH F. FISH</b> .	
<input checked="" type="checkbox"/> <b>Verified</b>	The Co-Trustees of the Rose Fish Trust are <b>PHILLIP F. FISH, ANDREA K. FRITZEN, and JOSEPH F. FISH</b> .	
<input type="checkbox"/> <b>Inventory</b>	The Family Trust assets were distributed in equal shares to the beneficiaries on or about 1/22/15.	
<input type="checkbox"/> <b>PTC</b>	Rose Fish had a general power of appointment over the Rose Fish Trust, and if not exercised, then the unappointed principal was to be added to the Family Trust upon her death.	
<input type="checkbox"/> <b>Not.Cred.</b>	The Rose Fish Trust assets were not distributed to the Family Trust.	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	As of 12/31/14, the assets of the Rose Fish Trust included various accounts totaling \$418,843.18, plus the contents of a Safe Deposit Box and various coins found in the Rose Fish Piano.	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> <span style="float:right">w</span>	Petitioners state they have requested that the Rose Fish Trust be distributed. Co-Trustee <b>JOSEPH F. FISH</b> has refused to make distribution. Under Probate Code § 15620, unanimous action is required by the co-trustees.	
<input type="checkbox"/> <b>Aff.Pub.</b>	<b><u>SEE ADDITIONAL PAGES</u></b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input checked="" type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 2/26/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10A - Fish</b>

**Petitioners state:** Except for accounting fees owed to CPA Jim G. Sabbatini and income taxes, all creditors of Rose Fish, the Rose Fish Trust, and the Family Trust have been paid, and the trusts are in a condition for distribution. Mr. Sabbatini provided an estimate of the income taxes due for Rose Fish's 2014 income tax returns and on 3/13/15, a letter and email were sent to Jon Adams, attorney for Joseph Fish, informing him of the Federal and California combined liability of \$13,000.00. Mr. Sabbatini timely prepared vouchers for automatic extensions of time to file. Petitioners had a letter prepared to Wells Fargo Advisors from all three co-trustees with instructions to prepare checks for the tax payments. Joseph Fish did not sign the letter of instruction and Wells Fargo Advisors did not issue the checks for the tax payments.

On 4/6/15, Mr. Sabbatini computed the extension payments and Petitioners advanced two-thirds of the extension payments and now each of them seeks reimbursement from the Rose Fish Trust for the Federal income tax payment of \$3,169.00 and the California income tax payment of \$787.00. Advancement by the co-trustees and reimbursement is allowed under the terms of the trust.

**Breach of Trust:** Petitioners state the failure of Joseph F. Fish to agree to distribution and to sign the letter of instruction and make the payments of income taxes constitute a breach of trust including breach of duty to administer the trust according to its terms and the duty of loyalty. All three remainder beneficiaries have been damaged by the actions of Joseph F. Fish including legal fees of \$5,063.50 for filing this petition and \$3,620.00 for legal work in connection with the payment of income taxes. See Exhibits F and G. Petitioners request the court remedy this breach by paying \$8,683.50 from the trust estate to Coleman and Horowitz, LLP.

Further, Petitioners request the court remedy the breach of trust by removing Joseph F. Fish as a co-trustee of the Rose Fish Trust and as a co-trustee of the Family Trust.

Under the terms of the Rose Fish Trust pursuant to the Second Amendment, upon the resignation, incapacity or death of any of the co-trustees, the remaining individuals shall serve as trustees. Petitioners requests that they be appointed as the Co-Trustees of the Rose Fish Trust.

Under the terms of the Family Trust pursuant to the First Amendment, upon the resignation, incapacity, or death of a co-trustee, then the remaining individual shall serve as sole trustee. Petitioners request that Phillip F. Fish be appointed sole trustee of the Family Trust.

**Accounting Fees:** Mr. Sabbatini has submitted invoices totaling \$3,295.00 that have not yet been paid, and has also provided accounting services in connection with preparation of an informal accounting totaling \$600.00. An estimated final accounting bill is \$1,450.00. Mr. Sabbatini seeks a total payment of \$5,345.00.

**SEE ADDITIONAL PAGES**

**Petitioners pray for the following:**

1. An order removing Joseph F. Fish as a co-trustee of the Rose Fish Trust;
2. An order appointing Phillip F. Fish and Andrea K. Fritzen as co-trustees of the Rose Fish Trust;
3. An order removing Joseph F. Fish as a co-trustee of the Family Trust;
4. An order appointing Phillip F. Fish as sole trustees of the Family Trust;
5. An order instructing Phillip F. Fish and Andrea K. Fritzen as co-trustees of the Rose Fish Trust to:
  - a. Reimburse Petitioners \$3,169 each for the amounts advanced for extension payments on federal income taxes and \$787 each for California income taxes for Rose Fish for 2014;
  - b. Pay \$8,683.50 to Coleman & Horowitz, LLP to remedy a breach of trust in connection with failing to make distribution of the Rose Fish Trust and to remedy a breach of trust in connection with income tax returns and extensions;
  - c. Pay Jim Sabbatini \$5,345 for accounting services;
  - d. Completely withdraw the CDs of the Rose Fish Trust held at EECU;
  - e. Distribute the balance of the Rose Fish trust estate to Phillip F. Fish as trustee of the Family Trust;
6. An order instructing Phillip F. Fish as sole trustees of the Family Trust to:
  - a. Retain a reserve for closing expenses of \$9,000.02 and to distribute the balance of the reserve account equally to the beneficiaries without further court order;
  - b. Distribute the trust estate of the Family Trust, including additions from the Rose Fish Trust, to the persons entitled thereto;
7. For costs herein; and
8. For such other orders as the Court deems proper.

**Update: Objection filed 6/30/15 by Co-Trustee Joseph F. Fish states Petitioner's motion should be denied. Petitioner filed a Reply to the Objection on 7/7/15.**

**SEE ADDITIONAL PAGES**

**Objection provides history and states** that during the course of their combined efforts to resolve unpaid bills and determine the full extent of the financial holdings, communications and cooperation between the three siblings reached an impasse after approx. \$75,000 had been cooperatively distributed. The CPA who handled the personal and trust tax returns indicated that approx. \$341,000 had been spent providing care for their mother. Objector requested the cooperation of his siblings in obtaining full financial disclosure pertaining to expenses actually paid, expenses that remained unpaid, and locating additional undisclosed assets. Each time, Joseph was told not to worry about it, and was denied. Eventually, counsel for each side became involved.

The parties struck an informal agreement whereby Joseph was to receive the cooperation of his siblings by their signing financial authorizations to allow him to obtain copies of the records for the pertinent time frame at his own expense. In exchange, the entirety of the holdings in Trust B were distributed. However, as soon as Trust B was distributed, Petitioners advised they would not cooperate as previously indicated until distribution of Trust A was completed.

Objector contacted numerous institutions and has confirmed a previously undisclosed CD in excess of \$18,000, a CalSTRS death benefit in excess of \$5,000, and the existence of several other accounts for which information was not released because Objector was not named on the account. Objector hired a forensic accountant to review the limited information obtained. A number of discrepancies resulted in Objector filing **Fresno County Superior Court Case No. 15CECG01222** against Andrea K. Fritzen alleging negligence, financial elder abuse, fraud deceit, conversion and breach of fiduciary duty. Petitioners responded by filing this petition.

See Objection for specific disputed issues. Objector states the Court should maintain the status quo pending financial investigation. There is no risk of assets losing value, and nearly \$2.5 million has already been distributed equally between the three adult siblings. There would be no prejudice to the parties for this Court to order the status quo be maintained until further hearing on or about 9/15/15. By that time, Objector will have obtained the missing financial documents and the forensic CPA will have had time to evaluate the records to determine the propriety of questionable financial transactions and report back to this court accordingly.

**Reply filed 7/7/15 addresses the disputed issues identified in the Objection** including accounting fees, distribution, and tax payments, and requests the Court order distribution as prayed.

**Status Report filed 2/16/16 by Petitioners Phillip F. Fish and Andrea K. Fritzen states** prior to the mediation date, counsel for Joseph Fish notified them that Joseph Fish was not ready to proceed as he had still not received all the banking records subpoenaed. Thus, mediation was continued to 5/23/16 before Judge Broadman at the offices of Petitioners' counsel. See report re details of the civil case. Petitioners state they are very frustrated by the delay. Although Petitioners will wait until after the 5/23/16 mediation, if the matter is not resolved before that date, Petitioners will ask the Court to rule on their motion to remove Joseph Fish as trustee.

**Status Report filed 2/26/16 by Co-Trustee Joseph Fish states** he agrees that this matter should be continued until after the mediation scheduled for 5/23/16. Mr. Fish states there are a number of issues that have caused various delays, all of which have been resolved with the exception of Wells Fargo Bank. See report for details.

**10B      In Re: The Kermit F. Fish and Rosalie J. Fish Revocable Living Trust  
Agreement dated 10/25/1993; Trust A-the Survivor's Trust; Trust B-the Family Trust  
Case No. 15CEPR00402**

**Attorney      Nahigian, Eliot S. (for Petitioners Phillip F. Fish and Andrea K. Fritzen)  
Attorney      Adams, Jon P. (for Objector Joseph F. Fish)**

**Status RE: Related Civil Matter**

		<b>PHILLIP F. FISH and ANDREA K. FRITZEN</b> filed the Petition at Page A on 4/16/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Also on 4/16/15, <b>JOSEPH F. FISH</b> filed a civil complaint in 15CECG01222.	
<b>Cont. from 102715</b>		<b>JOSEPH F. FISH</b> objected to this petition.	<b>Minute Order 10/27/15:</b> The related civil matter is set for mediation on 2/3/16. Should the matter not resolve, Counsel is to provide updated written status reports.
<b>Aff.Sub.Wit.</b>		<b>Minute Order 7/14/15 states:</b> The Court does not feel it is appropriate to rule until the proceedings in Civil are litigated or updated information on the matter is provided. Both sides are to file status reports, verified by clients, as to this matter and the civil matter at least two court days prior to 10/27/15. If the civil matter is not resolved by 10/27/15, then the parties are ordered to be personally present in court on that date and provide the name of an agreed upon mediator or the Court may impose sanctions.	
<b>Verified</b>			<b>Status Report filed 10/21/15 by Petitioners Phillip F. Fish and Andrea K. Fritzen states (re the probate matter)</b> that since the last hearing, Petitioners have provided various information to Objector and have attempted to resolve the disputes re whether Jim Sabbatini CPA would continue as the trusts' accountant or whether an alternate could be agreed upon, nominating William Chaltraw, Phil Lozano, and Ginger Lozano as alternate accountants. Petitioners also tried to resolve whether invoices for Mr. Sabbatini's work should be paid from the trust, and attempted to resolve the dispute with Joseph Fish by selecting an independent trustee to take over for the current trustees or otherwise compromising the dispute concerning the fees allowing Joseph Fish to select any of the four accountants he proposed, or one of the following: Terry Stone, John Slater, Tom Ryan, or Doug Sampson. Joseph Fish did not accept either alternative. Petitioners also offered to appoint an independent trustee such as Bruce Bickel, or split trustee obligations, including the CPA costs and equally distributing proceeds from the CDs. Joseph Fish did not accept either alternative. <b>See Page 2 re status of civil matter.</b>
<b>Inventory</b>		<b>SEE PAGE 2</b>	
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 2/26/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 10B – Fish</b>

**10B**



**Petitioners' Status Report Re Civil Case:** The Court set an OSC Re Stipulation Regarding ADR on 8/22/15. The parties have agreed to have Judge Howard Broadman (ret.) mediate both the civil matter on 2/3/16 and filed the Stipulation Re ADR on 10/19/15. Thus, the OSC will go off calendar. The Court has the following dates scheduled:

- 11/9/16 Mandatory Settlement Conference
- 12/2/16 Trial Readiness Conference
- 12/7/16 Court Trial

Plaintiff Joseph Fish continues to subpoena records from various banks and financial institutions. Petitioners have not conducted any discovery in the civil action due to representation from Mr. Fish's counsel that he would inform Petitioners if any irregularities are discovered and if not the civil action will be dismissed.

On or about 8/18/15, Petitioners requested that Joseph Fish mediate their disputes on 9/22/15 before Judge Broadman. Counsel for Joseph Fish refused, claiming he had not yet had sufficient time to obtain and evaluate the various trusts' financial records.

**Petitioners' request for action: Petitioners request the Court continue the status conference and Petitioners' Petition to Remove Joseph Fish as Co-Trustee until 3/3/16 or later to allow parties to complete the mediation scheduled for 2/3/16.**

**Status report filed 10/22/15 by Joseph Fish states** records were subpoenaed beginning in May 2015. In several instances the entity was no longer in existence, but had been absorbed by a new entity, such that Pruco Life Insurance is now Prudential Life Insurance and Wachovia Securities is now Wells Fargo Advisors. Once the identities of the holder of records/accounts were identified, subpoenas were issued. Most institutions requested additional time to produce the records due to the quantity requested (2008-present).

Two institutions initially refused to comply or confirm or identify individuals that were entitled to notice. It was subsequently determined that Philip Fish, although not named in the civil action, was named on some of the accounts. Those subpoenas were reissued to include notice to Philip Fish, who then filed objections.

Some records have been received, and some are expected in November. Mediation is scheduled for 2/3/16 with Judge Howard Broadman (ret.) as mediator. The parties have been unable to resolve matters regarding the billing dispute.

**Status Report filed 2/16/16 by Petitioners Phillip F. Fish and Andrea K. Fritzen states** prior to the mediation date, counsel for Joseph Fish notified them that Joseph Fish was not ready to proceed as he had still not received all the banking records subpoenaed. Thus, mediation was continued to 5/23/16 before Judge Broadman at the offices of Petitioners' counsel. See report re details of the civil case. Petitioners state they are very frustrated by the delay. Although Petitioners will wait until after the 5/23/16 mediation, if the matter is not resolved before that date, Petitioners will ask the Court to rule on their motion to remove Joseph Fish as trustee.

**Status Report filed 2/26/16 by Co-Trustee Joseph Fish states** he agrees that this matter should be continued until after the mediation scheduled for 5/23/16. Mr. Fish states there are a number of issues that have caused various delays, all of which have been resolved with the exception of Wells Fargo Bank. See report for details.

**Waiver of Accounting and Petition for Final Distribution under Will and Allowance of Statutory Attorney's Fees**

<b>DOD: 12/13/13</b>		<b>ERIN E. MESSER</b> , Executor, is petitioner.  Accounting is waived.  I &A - <b>\$325,000.00</b> POH - <b>\$325,000.00</b>  Executor - <b>waives</b>  Attorney - <b>\$9,500.00</b> (statutory, payable \$3,800.00 to Jeffrey Simonian, former attorney for Executor, and \$5,700.00 to Kevin Gunner)  <b>Distribution, pursuant to Decedent's Will and assignment of interest, is to:</b>  Erin E. Messer - 100% interest in real property.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 012616</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/O		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b> <b>Reviewed on: 2/29/16</b> <b>Updates:</b> <b>Recommendation: SUBMITTED</b> <b>File 11- Ryan</b>

Probate Status Hearing RE: Transfer to Oregon

<b>Age: 8</b>	<b>ABEL WRATE</b> and <b>YER WRATE</b> , paternal uncle and aunt, were appointed Co-Guardians on 08/26/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 120215</b>	Both Petitioners and the minor reside in the State of Oregon.	<b>Page 2B is Petition to Fix Residence Outside the State of California.</b>
<b>Aff.Sub.Wit.</b>	<b>Minute Order from 08/26/15</b> set this status hearing and states: The Petition is granted with the condition that the matter is to be transferred to Oregon.	<b>Minute Order of 12/02/2015: Counsel requests additional time; the Court directs Counsel to file paper proof of an Oregon Order. No appearance is necessary on 03/02/2016 if the proof is filed at least two court days prior.</b>
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

Reviewed by: LV

Reviewed on: 02/29/2016

Updates:

Recommendation:

File 12A - Her

Age: 8		<b>ABEL WRATE and YER WRATE</b> , paternal uncle and aunt, were appointed Co-Guardians on 08/26/15.  <u>Please see petition for details</u>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> Pursuant to Probate Code §2352(d), Petitioners shall cause a guardianship or equivalent proceeding to be commenced in the new state of residence, if longer than four months. Therefore, if granted, the Court will set a status hearing as follows for proof of establishment of a guardianship there:  <ul style="list-style-type: none"> <li>Wednesday, August 03, 2016</li> </ul> If proof of establishment of guardianship is filed prior to the status hearing date, the status hearing may be taken off calendar.	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: LV				
Reviewed on: 02/29/2016				
Updates:				
Recommendation:				
File 12B- Her				

Probate Status Hearing RE: Report from the Public Guardian

		<p><b>PUBLIC GUARDIAN</b>, was appointed Successor Conservator on 08/19/15. Letters of Conservatorship were issued on 01/13/16.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Minute Order of 01/27/2016: Mr. Janisse reports that a hearing on the former Conservator's accounting was held in San Mateo last week, but was continued to 02/22/2016; this matter is awaiting resolution in the San Mateo matter.</p>
Cont. from 012716		<p><b>Minute Order dated 8/19/2015</b> from the hearing on the petition stated that the Court would sign the order upon receipt of resignation from the current Conservator [Carolyn Sadler] and set a status hearing for 11/18/15.</p> <p><b>Minute Order from 11/18/15</b> set this status hearing for a report from the Public Guardian and stated: Counsel reports that San Mateo retained jurisdiction as to Ms. Sadler's final accounting, setting it for a hearing on 12/22/15. The Public Guardian has arranged a meeting with Ms. Sadler for today and will make a demand for the assets to be turned over.</p> <p><b>Status Report of the Public Guardian Regarding the Conservatorship filed 02/25/2016</b> states the proceedings for the conservatorship were previously in San Mateo County. The San Mateo proceedings remain open for the purposes of hearing the final account of the former conservator. The next scheduled hearing in San Mateo matter is March 22, 2016.</p> <p>On 01/20/2016, the Fresno County Public Guardian's office received a cashier's check in the amount of \$315,248.13 from the former conservator, Carolyn Sadler. Furthermore, the Public Guardian applied to become the representative payee for Mr. Eidson's Social Security benefits, but, to date, that responsibility has not been transferred to the Public Guardian. Therefore, in order to keep receiving Mr. Eidson's automatic deposits, a small amount was left in his former bank account. As soon as the Public Guardian becomes the representative payee, she will request that the account be closed and all remaining funds be transferred.</p>	
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 02/29/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 13- Eidson</b></p>	

## Petition for Appointment of Guardian of the Person

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 1/20/16:</u> Examiner notes and workshop information provided in open court.  <u>Note:</u> Petitioner filed "Proof of Service by Mail" on 1/20/16 indicating "all documents re child custody and attachments" were mailed to the relatives; however, Petitioner did not use the mandatory Judicial Council form GC-020 "Notice of Hearing – Guardianship or Conservatorship," which contains mandatory information regarding the hearing date and should be served with a copy of the petition for guardianship.  Therefore, the following issues remain noted:  1. Need Notice of Hearing.  2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 on: - Juan Antonio Torres (Maternal Grandfather) - Eric Knighton (sibling) - Dominic Knighton (sibling)	
Cont.d from 120915, 012016				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2/26/16	
			Updates:	
			Recommendation:	
			File 14 – Knighton	

**Probate Status Hearing RE: Receipt for Blocked Account**

<b>Age: 76</b>	<b>ALICE SAMPLE</b> , spouse, was appointed Conservator of the Person and Estate on 12/16/15 with \$39,000.00 to be placed into a blocked account.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 020316</b>	<b>Minute Order</b> from hearing on 12/16/15 set this status hearing regarding filing of a Receipt and Acknowledgement for Blocked Account.	<b><u>OFF CALENDAR.</u></b> <b><u>Bond filed 02/29/2016 in the amount of \$48,400.00.</u></b>
<b>Aff.Sub.Wit.</b>	An Amended Order Appointing Conservator of the Person and Estate filed 02/17/2016 orders bond in the amount of \$48,400.00.	<b>Minute Order of 02/03/2016:</b> Counsel requests a continuance due to an error in the distributions to the conservatee.
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 02/29/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 15- Sample</b>



Petition of Will and for Letters Testamentary; Authorization to Administer under IAEA

<b>DOD: 1/15/14</b>		<b>CHRISTY L. PEDRON</b> , Daughter and named alternate Executor without bond, is Petitioner.  Named Executor LaVerne A. Martinson is deceased.  Full IAEA – ok  Will dated 1/31/06  Residence: Clovis Publication: Business Journal  Estimated value of estate: Real property: \$75,250.00  Probate Referee: Rick Smith	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Minute Order 12/16/15: Matter is continued due to the lack of publication. Ron Martinson requests a March setting to allow time for him to fly out here and obtain representation; Mr. Aguirre has no objection to the request.</u>  <u>Note: As of 2/26/16, no written objections have been filed.</u>  <u>Note: If granted, the Court will set status hearings as follows:</u> <ul style="list-style-type: none"> <li>• Wednesday August 3, 2016 for filing Inventory and Appraisal</li> <li>• Wednesday May 3, 2017 for filing the first account or petition for final distribution</li> </ul>	
<b>Cont. from 121615</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			S/P
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 2/26/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 16 - Martinson</b>

**17 Stevee Barboza, Apollonia Barboza (GUARD/P) Case No. 15CEPR01160**

Petitioner: Gabrielle Vasquez (pro per)

Petitioner: Carmen Barbosa (pro per)

Objector: Caroline Barboza (pro per)

Objector: Steve Delsid (pro per)

**Petition for Appointment of Guardian of the Person**

		<b>TEMPORARY EXPIRES 3/2/16</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>CARMEN BARBOSA</b> , maternal grandmother, and <b>GABRIELLE VASQUEZ</b> , sister, are petitioners.	<ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence on:               <ol style="list-style-type: none"> <li>a. Ronaldo Rubio (father of Apollonia)</li> <li>b. Apollonia Barboza (minor)</li> </ol> </li> <li>3. Petition indicates Apollonia has Native American ancestry. Therefore, a <i>Notice of Child Custody Proceeding for Indian Child</i> (Form ICWA-030) must be completed and returned to the probate clerk for service prior to the hearing. A copy of the form was given to the petitioners at the temporary hearing on 12/9/15 however it was never returned for service.</li> <li>4. Objections were not served on all interested parties.</li> </ol>
<b>Cont. from</b>		Please see petition for details.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	X	
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	X	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input checked="" type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 2/29/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 17 – Barboza</b>

Petitioner Karen Adele Higgins (Pro Per Petitioner)  
 Objector Michael Higgins (Pro Per Objector)  
 Attorney David N. Knudson (Court-appointed for Proposed Conservatee)

## Petition for Appointment of Probate Conservator of the Person

NO TEMPORARY REQUESTED			NEEDS/PROBLEMS/ COMMENTS:
KAREN ADELE HIGGINS, mother, is Petitioner.			<p><b>Page 18B</b> is the competing petition filed by <b>MICHAEL HIGGINS</b>, father.</p> <p><b>Continued from 2/1/2016.</b> Minute Order states Mr. Knudson, court-appointed counsel, requests that the proposed Conservatee be allowed to come into the courtroom; the Court denies the request. Parties are admonished that in the future, late-filed documents will be stricken. This matter is continued to meet up with the competing petition of Michael Higgins.</p>
~Please see Petition for details~			
Court Investigator's Report was filed on 1/26/2016.			
Objection to the Proposed Conservatorship filed by MICHAEL HIGGINS, father, on 1/28/2016.			
[Karen Higgins'] Response to Objection of Michael Higgins of Proposed Conservator filed 1/29/2016.			
Cont. from 020116			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W/		
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.			
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
✓ Objections			
✓ Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
✓ Citation			
FTB Notice			
			Reviewed by: LEG
			Reviewed on: 2/29/16
			Updates:
			Recommendation:
			File 18A-Higgins

18A

Petitioner Karen Adele Higgins (Pro Per)

Petitioner Michael Higgins (Pro Per)

Attorney David N. Knudson (Court-appointed for Proposed Conservatee)

## Petition for Appointment of Limited Probate Conservator of the Person and Estate

		<b>NO TEMPORARY REQUESTED</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>MICHAEL HIGGINS</b> , father, is Petitioner.	<ol style="list-style-type: none"> <li>1. <i>Capacity Declaration</i> of Steven Ehrreich, M.D., was filed 1/25/2016 by Petitioner Karen Higgins in support of her request for medical consent powers. Court may require Petitioner Michael Higgins to obtain and file a <i>Capacity Declaration</i> in support of his own petition and request for such powers.</li> <li>2. Items 1(h) and 1(i) of the <i>Petition</i> request orders relating to the powers and duties of the proposed limited conservator of the person and of the estate, without specifying the orders and powers in Attachments 1(h) and 1(i) as required.</li> <li>3. Petitioner requests appointment as Conservator of the Estate; however, the information regarding character and estimated value of the estate provided in Item 3(e) of the <i>Petition</i> indicates that the proposed Conservatee has no assets.</li> <li>4. Need <i>Confidential Conservator Screening</i> form.</li> <li>5. Need <i>Conservatorship Video Viewing Certificate</i> pursuant to Local Rule 7.15.8(A).</li> </ol>
		<b>Court Investigator Jennifer Young's Report filed 2/26/2016.</b>	
<b>Cont. from</b>		<b>[Karen Higgins'] Objection to Michael Higgins' Petition for Conservatorship of Victoria Higgins filed 2/24/2016.</b>	
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>Cap Dec.</b>	✓	
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
✓	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
✓	<b>Objections</b>		
	<b>Video Receipt</b>	X	
✓	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
✓	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 3/1/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 18B- Higgins</b>

<b>DOD: 07/11/2010</b>	<b>JOYCE VERMILLION</b> , daughter-in-law, and wife of decedent's son, Michael Vermillion, petitions on behalf of Michael Vermillion to be appointed as Administrator with bond set at \$200,000.00.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> Receipt of Bond filed 02/18/2016 in the amount of \$200,000.00.  1. It is unclear if the petitioner is filing on her own behalf to be appointed as Administrator or on behalf of her husband as his Attorney in Fact. Petitioner cannot file as Attorney in Fact for her husband as it is considered to be the unauthorized practice of law. Need clarification.  2. Need date of death of the deceased spouse pursuant to Local Rule 7.1.1D.  <b>Note: If the petition is granted status hearings will be set as follows:</b>  <ul style="list-style-type: none"> <li>• <b>Wednesday, 08/03/2016 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Wednesday, 05/03/2017 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	Petitioner resides in Washington.	
<input type="checkbox"/> <b>Inventory</b>	Full IAEA – o.k.	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	Decedent died intestate	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Residence: Sanger Publication: The Sanger Herald	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>	<b>Estimated value of the Estate:</b> Real property - \$200,000.00	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	Probate Referee: Rick Smith	
<input type="checkbox"/> <b>Conf. Screen</b>	<b>Petitioner states:</b> the decedent died intestate on 07/11/2010. Since her death, her son James, has resided in the decedent's home. More than 5 years have passed since Decedent's death. Her son, Michael Vermillion no longer has capacity and is unable to petition for the appointment of a personal representative. The decedent's other two children have been unwilling to deal with the administration of the estate and neither has filed a petition for the appointment of personal representative. Petitioner, the spouse of Michael Vermillion and also his attorney in fact under a general power of attorney, a copy of which is attached, therefore petitions on behalf of her husband, an heir of the estate, to be appointed the administrator.	
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV <b>Reviewed on:</b> 02/29/2016 <b>Updates:</b> <b>Recommendation:</b> <b>File 19- Vermillion</b>

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA

<b>DOD: 12/29/15</b>			<b>ESTHER ARTHUR</b> , Named Executor without bond, is Petitioner.  Full IAEA – ok  Will dated 8/29/12  Residence: Clovis Publication: Business Journal  Estimated value of estate: Personal property: \$280,000.00 Real property: \$40,000.00 Total: \$320,000.00  Probate Referee: Rick Smith	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> The Court will set status hearings as follows: <ul style="list-style-type: none"> <li>Wednesday August 3, 2016 for filing the Inventory and Appraisal</li> <li>Wednesday May 3, 2017 for filing the first account or petition for final distribution.</li> </ul>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<b>S/P</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	<b>W</b>		
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc	
			<b>Reviewed on:</b> 2/29/16	
			<b>Updates:</b>	
			<b>Recommendation:</b> SUBMITTED	
			<b>File</b> 20- Divers	

Attorney

Muzio, Shelise (for Petitioner)

Attorney

Rindlisbacher, Curtis D. (Court appointed for Subject Bill Brady)

## Petition for Authorization to Consent to Necessary Medical Treatment (Prob. Code §3200 et seq.)

			<b>DR. PETER LAVALLE, MD</b> , Medical Director of the Department of State Hospitals – Coalinga, is Petitioner.  <p style="text-align: center;">See petition for details.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <p>1. <b>Need Notice of Hearing</b> (Mandatory Judicial Council Form GC-020) and proof of service, along with a copy of the petition, at least 15 days prior to the hearing per Probate Code §3206 on:</p> <ul style="list-style-type: none"> <li>- Bill Brady</li> <li>- Relatives (parents, adult daughter), if diligence not found</li> </ul> <p>(Petitioner filed a pleading-form Notice of Hearing on 1/25/16; however, it is blank as to the pertinent information re hearing date/time, does not indicate that a copy of the petition was served, and does not contain any proof of service on the subject, Bill Brady.)</p>				
<input type="checkbox"/>	Aff.Sub.Wit.							
<input checked="" type="checkbox"/>	Verified							
<input type="checkbox"/>	Inventory							
<input type="checkbox"/>	PTC							
<input type="checkbox"/>	Not.Cred.							
<input type="checkbox"/>	Notice of Hrg	X						
<input type="checkbox"/>	Aff.Mail	X						
<input type="checkbox"/>	Aff.Pub.							
<input type="checkbox"/>	Sp.Ntc.							
<input type="checkbox"/>	Pers.Serv.							
<input type="checkbox"/>	Conf. Screen							
<input type="checkbox"/>	Letters							
<input type="checkbox"/>	Duties/Supp							
<input type="checkbox"/>	Objections							
<input type="checkbox"/>	Video Receipt							
<input type="checkbox"/>	CI Report							
<input type="checkbox"/>	9202							
<input checked="" type="checkbox"/>	Order							
<input type="checkbox"/>	Aff. Posting							
<input type="checkbox"/>	Status Rpt							
<input type="checkbox"/>	UCCJEA							
<input type="checkbox"/>	Citation							
<input type="checkbox"/>	FTB Notice							
<table border="1" style="width: 100%;"> <tr> <td><b>Reviewed by:</b> skc</td> </tr> <tr> <td><b>Reviewed on:</b> 2/29/16</td> </tr> <tr> <td><b>Updates:</b></td> </tr> <tr> <td><b>Recommendation:</b></td> </tr> <tr> <td><b>File</b> 21- Brady</td> </tr> </table>				<b>Reviewed by:</b> skc	<b>Reviewed on:</b> 2/29/16	<b>Updates:</b>	<b>Recommendation:</b>	<b>File</b> 21- Brady
<b>Reviewed by:</b> skc								
<b>Reviewed on:</b> 2/29/16								
<b>Updates:</b>								
<b>Recommendation:</b>								
<b>File</b> 21- Brady								

Attorney Daniel T. McCloskey (for Petitioners Kenneth F. Fairless and Virgil A. Fairless)

## Petition to Determine Succession to Real Property

<b>DOD: 9/19/2015</b>	<b>KENNETH F. FAIRLESS</b> and <b>VIRGIL A. FAIRLESS</b> , sons, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	40 days since DOD.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	No other proceedings.	
<input checked="" type="checkbox"/> <b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>	I & A - \$125,000.00	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	W/ <b>Will dated 5/9/2012</b> devises the entire estate to the Petitioners at <b>50%</b> interest to each.	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>	<b>Petitioner requests</b> Court determination that Decedent's <b>100%</b> interest in real property located on Anthony Street in Tranquility passes to the Petitioners pursuant to Decedent's will.	
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 2/29/16
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File 22- Owen</b>



## Petition for Appointment of Probate Conservator of the Estate

Age: 62		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> <li>Wednesday July 6, 2016 for filing the Inventory and Appraisal</li> <li>Wednesday May 3, 2017 for filing the first account.</li> </ul>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc Reviewed on: 2/29/16 Updates: Recommendation: File 23- Douthett				

Petitioner

Camacho, Rosalba (Pro Per – Daughter – Petitioner)

Attorney

LeVan, Nancy J. (Court appointed for Proposed Conservatee)

## Petition for Appointment of Probate Conservator of the Person

See petition for details.			<b>NEEDS/PROBLEMS/COMMENTS:</b>  Court Investigator advised rights on 2/22/16  Voting rights affected – need minute order  1. The Capacity Declaration does not address dementia medication powers; only dementia placement. The Court may require clarification or revised capacity declaration.  2. Need video receipt per Local Rule 7.15.8.A.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt	X	
✓	CI Report		
	9202		
✓	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 2/29/16
			Updates:
			Recommendation: 3/1/16
			File 24- Rosales

Petitioner

Bonillas, Marie A. (Pro Per – Daughter – Petitioner)

Attorney

Court appointed for Proposed Conservatee)

## Petition for Appointment of Temporary Conservator of the Person and Estate

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			Court Investigator advised rights on 2/24/16
			<u>Note:</u> Petitioner resides in Modesto, CA.
<input type="checkbox"/>	Aff.Sub.Wit.		<ol style="list-style-type: none"> <li>1. The Investigator was not able to make contact the petitioner prior to the filing of the report. The Court may require further investigation pursuant to Probate Code §2250.6.</li> <li>2. Need Notice of Hearing.</li> <li>3. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on Proposed Conservatee Theodore W. Bonillas.</li> <li>4. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on all relatives listed at #11.</li> <li>5. Need clarification re annual income for bond calculation.</li> <li>6. Need bond in an appropriate amount.</li> </ol>
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 2/29/16
			Updates:
			Recommendation:
			File 25- Bonillas

# 26 Christopher Harshaw, JR, Ciara Harshaw (GUARD/P)

Case No. 16CEPR00191

Petitioner Harshaw, Anna Marie (Pro Per – Paternal Aunt)

Petition for Appointment of Temporary Guardian of the Person

Christopher Age: 12	<p><b><u>GENERAL HEARING 04/26/2016</u></b></p> <p><b>ANNA MARIE HARSHAW</b>, paternal aunt, is petitioner.</p> <p><b><u>Please see petition for details</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Shameka Hill (Mother)</li> <li>• Christopher Harshaw (Minor)</li> </ul> </li> <li>3. Confidential Guardian Screening form filed 02/22/2016 is incomplete at #1 which includes the proposed guardian's date of birth, social security number, driver's license, and telephone number.</li> </ol>	
Ciara Age: 10			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			X
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			X
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 02/29/2016</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 26- Harshaw</b></p>			

Petitioner Lopez, Amanda (Pro Per – Sister – Petitioner)

## Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: - Jose Medina (Minor) - Jose Medina (Father) - Armando Ramirez (Father) - Alethea Alvarez (Mother)	
<input type="checkbox"/>	Aff.Sub.Wit.			<input type="checkbox"/>
<input checked="" type="checkbox"/>	Verified			<input type="checkbox"/>
<input type="checkbox"/>	Inventory			<input type="checkbox"/>
<input type="checkbox"/>	PTC			<input type="checkbox"/>
<input type="checkbox"/>	Not.Cred.			<input type="checkbox"/>
<input type="checkbox"/>	Notice of Hrg			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Mail			<input type="checkbox"/>
<input type="checkbox"/>	Aff.Pub.			<input type="checkbox"/>
<input type="checkbox"/>	Sp.Ntc.			<input type="checkbox"/>
<input type="checkbox"/>	Pers.Serv.			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Conf. Screen			<input type="checkbox"/>
<input checked="" type="checkbox"/>	Letters			<input type="checkbox"/>
<input checked="" type="checkbox"/>	Duties/Supp			<input type="checkbox"/>
<input type="checkbox"/>	Objections			<input type="checkbox"/>
<input type="checkbox"/>	Video Receipt			<input type="checkbox"/>
<input type="checkbox"/>	CI Report			<input type="checkbox"/>
<input type="checkbox"/>	9202			<input type="checkbox"/>
<input checked="" type="checkbox"/>	Order			<input type="checkbox"/>
<input type="checkbox"/>	Aff. Posting			<input type="checkbox"/>
<input type="checkbox"/>	Status Rpt			<input type="checkbox"/>
<input checked="" type="checkbox"/>	UCCJEA	<input type="checkbox"/>		
<input type="checkbox"/>	Citation	<input type="checkbox"/>		
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>		
Reviewed by: skc Reviewed on: 2/29/16 Updates: Recommendation: File 27- Ramirez / Medina				